

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

# Jorge Jose Jr. Lozano Velasquez (Guardianship) Case No. 02CEPR00878 ner Lozano, Jorge Ulloa (Pro Per Petitioner)

Petitioner

Petition for Appointment of Guardian of the Person

	See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			•	
				The Court may require notice to the biological mother and
				maternal relatives, including
	Aff.Sub.Wit.			siblings, pursuant to Probate
>	Verified			Code §1511.
	Inventory			
	PTC			
	Not.Cred.			
~	Notice of			
	Hrg			
~	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	Χ		
<b>/</b>	Conf.			
	Screen			
~	Letters			
~	Duties/Supp			
	Objections			
	Video			
	Receipt			
<b>×</b>	CI Report			
<u> </u>	Clearances			
<u> </u>	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			<b>Reviewed on:</b> 9/12/16
_	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 1- Jimenez/ Velasquez

Warren G Mara (Estate)
Kruthers, Heather H. (for Public Administrator)

First and Final Account and Report of Successor Administrator and Petition for Allowance of Ordinary Commissions and Fees and for Distribution

DOD:	9/8/04	The FRESNO COUNTY PUBLIC ADMINISTRATOR is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
Cont	. from 081516 Aff.Sub.Wit.	Account period: 1/12/15 - 5/13/16 Accounting: \$431,052.81 Beginning POH: \$393,935.25 Ending POH: \$370,108.80 (\$10,108.80 cash plus real property)	SEE ADDITIONAL PAGES
~	Verified Inventory	Public Administrator (Statutory): \$11,621.06	
>	PTC Not.Cred.	County Counsel (Statutory): \$11,621.06	
~	Notice of Hrg	Bond fee: \$1,077.64	
~	Aff.Mail W	Closing: \$2,000.00	
	Aff.Pub.  Sp.Ntc.  Pers.Serv.	<b>Petitioner states</b> after only partial distribution of commissions, fees, and costs totaling \$26,319.76, there will be no cash to distribute.	
>	Conf. Screen 1/12/15  Duties/Supp	On 4/21/16, the Court signed an Order for Settlement Agreement, which provides for distribution as follows:  • Gary O'Meara: \$55,000.00 cash  • James Mara: 100% interest in real property	
	Objections Video Receipt CI Report	Pursuant to the Order for Settlement Agreement, James Mara is responsible for unpaid fees and the \$55,000.00 cash distribution to Gary O'Meara.	
>	9202 Order Aff. Posting Status Rpt	Petitioner prays that:  1. The final account prepared herewith be settled, allowed and approved as filed and all acts and proceedings as successor administrator be confirmed and approved;  2. Petitioner and his attorney each be authorized the	Reviewed by: skc Reviewed on: 9/13/16
	UCCJEA Citation	sum of \$11,621.06 as their statutory compensation;  3. Petitioner Be authorized to pay from the estate a bond fee of \$1,077.64	Updates: Recommendation:
N/A	FTB Notice	<ol> <li>Petitioner be authorized to withhold from distribution the sum of \$2,000.00 for closing expenses of administration and to deliver the unused part to the beneficiaries of the estate without further court order;</li> <li>Distribution of the estate in Petitioner's hands be made as set forth above; and</li> <li>For such other and further orders as the Court deems just and proper.</li> <li>(Proposed order states James Mara is responsible for the cash payment of \$55,000 to Gary O'Meara and payment of any outstanding fees and costs approved.)</li> </ol>	File 2- Mara

**Page 2 – Note re history:** The heirs to this estate are the decedent's two living sons, Gary O'Meara and James Mara, pursuant to intestate succession and an assignment filed 11/21/14 by John G. O'Meara, Jr., son of a third predeceased son.

Gary O'Meara (represented by Attorney Melvin Rube) was appointed Administrator with Full IAEA without bond on 1/4/06. On 12/1/14, he was removed and ordered to account and turn over all paperwork pertaining to the estate to the Public Administrator. (Per Substitution filed 8/26/15, Gary O'Meara is now self-represented.)

Gary O'Meara filed his First Account as ordered on 1/22/15, and objections were filed thereon by James Mara (represented by Randolf Krbechek) and also by the Public Administrator. (Per Substitutions filed 1/15/16 and 2/2/16, James Mara is now represented by Attorney J. Stanley Teixeira.)

At Settlement Conference 4/12/16, agreement was reached for distribution as set forth in this petition.

#### NEEDS/PROBLEMS/COMMENTS:

<u>Note</u>: Response to Examiner Notes filed 9/9/16 states the Court is respectfully referred to the Note re history provided by the Examiner above. The PA is trying to close the estate by distributing cash to one heir and the real property to the other. The order for settlement agreement was filed 9/21/16.

- Petitioner states that the household furniture and furnishings valued at \$1,000.00 and mechanic's
  tools located at the real property valued at \$5,000.00 never came into Petitioner's possession, and
  neither the settlement agreement nor this petition appear to distribute them to either beneficiary.
  The Court may require clarification.
  - <u>Response filed 9/9/16 states</u> there was no discussion of the personal property at the settlement conference or in the agreement. The two heirs did not raise the issue of the furniture/furnishings and tools, and they reached agreement, so the PA asserts these items do not need to be accounted for to close the estate.
- 2. The Order for Settlement Agreement entered 4/21/16 requires that James Mara deposit funds sufficient to cover the \$55,000 distribution to Gary O'Meara and the statutory commissions and closing expenses of the estate with the PA within 90 days of signing, and indicates the PA would then petition to close and distribute the estate. Petitioner does not indicate that such funds were received from James Mara and instead requests the Court order that the Court order that James Mara be responsible for payment of Gary O'Meara and the remaining amounts as ordered. The Court may require the amounts to be deposited with the PA for distribution pursuant to the Order for Settlement Agreement, or alternatively may set a status hearing re payment, if ordered as prayed.

<u>Response filed 9/9/16 states</u> deposit of cash by James Mara became a case of catch 22. He was expected to deposit funds, but he needed to obtain a loan using the real property as collateral to have the money to do so. The settlement intended for him to receive the real property after the deposits were made. Each was contingent on the other. If James Mara is unable to obtain funds to deposit with the PA before first obtaining the property, then the PA agrees with the Examiner's alternative suggestion to set a status hearing re payment of fees.

#### **SEE ADDITIONAL PAGES**

## 2 Warren G Mara (Estate)

Case No. 05CEPR01367

#### Page 3 - NEEDS/PROBLEMS/COMMENTS (Cont'd):

3. The proposed order does not include distribution of the real property to James Mara. If granted, need revised order pursuant to Local Rule 7.6.1.A, which states the order should be complete in itself and set forth property descriptions with particularity required of judgments in civil matters.

**Response filed 9/9/16 states** the PA will submit a revised order.

4. Petitioner requests the entirety of the statutory compensation be paid to the Public Administrator and County Counsel (the Successor Administrator and his attorney). Need clarification with reference to Probate Code §§ 10805 and 10814, which state compensation shall be apportioned among two or more personal representatives and attorneys, or agreement with Gary O'Meara, Former Administrator, and Attorney Melvin Rube, his attorney.

Response filed 9/9/16 states it was Gary O'Meara's misappropriation of funds and failure to close the estate that led to the PA's appointment and it was never contemplated that he would receive a share of the statutory compensation. Re the attorney, County Counsel will discuss with Attorney Rube before the next hearing on 9/19/16

## 3 Jose Ramon Millan & Jose Rosario Millan (GUARD/P)

Case No. 07CEPR00475

Petitioner Millan, Martha (Pro Per – Mother)

Petition for Termination of Guardianship

Jos 13	e Ramon Age:		MARTHA MILAN, mother, is petitioner.	NEEDS/PROBLEMS/ COMMENTS:
11	nt. from 080116 Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of		Please see petition for details	Minute Order of 08/01/2016: Petitioner represents that the father of Jose Ramon is Leo, last name unknown, of Huron, and the father of Jose Rosario is Jose Rosario Atondo. The Court directs Petitioner to make diligent efforts to locate both father for proper service. Paternal grandparents of both minor are unknown to the petitioner.
<b>✓</b>	Aff.Mail	w /		Unless the Court dispenses with notice; need proof of service fifteen (15) days prior to the hearing of the
	Aff.Pub.			Notice of Hearing along
	Sp.Ntc. Pers.Serv.			with a copy of the Petition
	Conf. Screen			for Termination of Guardianship for: • Father of Jose
	Letters			Ramon (Unknown)
	Duties/Supp			<ul> <li>Paternal         Grandparents of     </li> </ul>
	Objections			Jose Ramon
	Video Receipt			(Unknown)  • Paternal
✓	CI Report			Grandparents of Jose Rosario
	9202			(Unknown)
✓	Order			
	Aff. Posting			Reviewed by: L∨
	Status Rpt			<b>Reviewed on:</b> 09/13/2016
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 3- Millan

Case No. 07CEPR00900

4 Victoria Luna (GUARD/P)
Petitioner Castillo, Gloria (Pro Per – Guardian)

Motion Modification of Visitation

Ag	Age: 12		GLORIA CASTILLO, guardian/non-relative, is	NEEDS/PROBLEMS/COMMENTS:
			petitioner.	, , ,
			Please see petition for details	Notice of Hearing filed 08/08/2016     does not indicate that the     Confidential Declaration filed by
Со	nt. from			Petitioner, Gloria Castillo, was served
	Aff.Sub.Wit.			on the mother Nicole Mary Donna
1	Verified			Clewley.
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
1	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
<u> </u>	Receipt			
	CI Report			
	9202			
	Order	Χ		
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 09/13/2016
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 4- Luna

4

# 5 Ava Natalya Castanon (GUARD/P) Case No. 12CEPR00852 Petitioner Castanon, Madelen (Pro Per – Mother) Petition for Termination of Guardianship

Ac	Age: 3		Madelen Castanon, mother, is	NEEDS/PROBLEMS/COMMENTS:
79	1.90.0		petitioner.	THEE BOYT ROBLEMO, COMMENTS.
			Please see petition for details	Minute Order of 08/01/2016: Examiner notes provided in open court. Petitioner is directed to ask
Со	ont. from 080116	5		the father the names and
	Aff.Sub.Wit.			whereabouts of the paternal
1	Verified			grandparents and properly notice them.
	Inventory			
	PTC			1. Need Notice of Hearing.
	Not.Cred.			
1	Notice of Hrg			2. Need proof of service fifteen (15) days prior to the hearing of the
	Aff.Mail	Х		Notice of Hearing along with a
	Aff.Pub.			copy of the Petition for Termination of Guardianship for:
	Sp.Ntc.			Paternal Grandfather (Not)
1	Pers.Serv.	w/		Listed)
	Conf. Screen			Macy Fox (Paternal Grandmother)
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			<b>Reviewed on:</b> 09/13/2016
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 5- Castanon

5

## 6 Nicole Bell and Aryah Bell (GUARD/P)

Case No. 13CEPR00281

Petitioner Genia Kay Dewan (Pro Per, mother)

Attorney Jonette M. Montgomery, of Hanford (for Guardian Josephine M. Longoria-Contente)

#### **Petition for Visitation**

			GENIA KAY (CHERRY) DEWAN, mother, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner.	
				Note: Petition for Termination of
			~Please see Petition for details~	Guardianship filed by Guardian
	ont. from 080116			JOSEPHINE M. LONGORIA-
		)		CONTENTE is set for hearing on
	Aff.Sub.Wit.		Declaration of Josephine M. Longoria-	<u>11/1/2016</u> .
✓	Verified		Contente Regarding Opposition to	Continued from 8/1/2016. Minute
	Inventory		Mother's Request for Visitation was filed	Order states Ms. Montgomery
	PTC		9/6/2016.	represents that her client is out of
	Not.Cred.			the country today but opposes
<b>—</b>	Notice of			the petition, and wants the
✓	Hrg			guardianship terminated in order
	<del> </del>	W/		for the matter to be resolved in
✓	All.Mall	**/		Family Court. The Court directs
	Aff.Pub.			Counsel to properly file a Petition
	Sp.Ntc.			for Termination. Genia Dewan is
	Pers.Serv.			advised to contact PD/CPS if she is concerned for the safety of the
	Conf.			minors in their father's care.
	Screen			Trimitors in trion ratifier 3 date.
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
	Order	Χ		
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 9/12/16
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 6 – Bell
				•

7

Gregory Lee Keys (CONS/P) Case
Kruthers, Heather H. (for Public Guardian – Successor Conservator)

### Probate Status Hearing Re: Review Need for Conservatorship

Age: 37	PUBLIC GUARDIAN, was appointed Successor	NEEDS/PROBLEMS/COMMENTS:
	Conservator of the Person.	0 11 14 04/10/2014
	Plages soo file for details	Continued from 06/13/2016
	<u>Please see file for details</u>	Minute Order of 12/04/2015:
Cont. from 120715,		counsel requests 6 months.
061316		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.	1	
Notice of	1	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	1	
Conf.	1	
Screen		
Letters		
Duties/Supp		
Objections		
Video	1	
Receipt		
CI Report	]	
9202	]	
Order		
Aff. Posting		Reviewed by: (JF) LV
Status Rpt		<b>Reviewed on:</b> 09/13/2016
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 7 - Keys

#### Georgia Irene Posey (CONS/P) 8

Case No. 14CEPR00714

Attorney: Heather H. Kruthers (for Public Guardian)

Attorney: Lisa Horton (for court-appointed for Conservatee)

First Account Current and Report of Conservator and Petition for Allowance of Compensation to Conservator and Attorney

		<b>PUBLIC GUARDIAN</b> , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 8/6/2014 - 6/17/2016	
Co ✓	Aff.Sub.Wit.	Accounting - \$154,634.19 Beginning POH - \$132,358.64 Ending POH - \$108,816.28 (\$13,566.28 is cash	and WalMart" totaling
<b>✓</b>	PTC Not.Cred. Notice of	Conservator - <b>\$11,059.36</b> (88.95 Deputy hours @ \$96/hr and 33.16 Staff hours @ \$76/hr)	However, there is no description of the nature and purpose of
1	Aff.Mail w/ Aff.Pub.	Attorney - <b>\$2,500.00</b> (per Local Rule)	"Garnishment- DMV" for a vehicle registration fee
	Sp.Ntc. Pers.Serv.	Bond fee - \$117.48 (o.k Costs - \$435.00	(\$249.00) and "Garnishment- Citibank" for a bank legal fee (\$125.00).
	Conf. Screen	(filing fees)	Need clarification/explanation.
	Letters Duties/Supp	Processing fee - \$132.50 (certified copy fees)	<ul> <li>Note: If the petition is granted, a status hearing will be set as follows:</li> <li>Tuesday, September 18, 2018 at</li> </ul>
	Objections Video Receipt CI Report	Petitioner prays for an order:  1. Approving, allowing and settling the first account;	9:00 a.m. in Department 303, for the filing of the second account.  Pursuant to Local Rule 7.5 if the
<b>✓</b>	9202 Order	<ul><li>2. Authorizing the conservator and attorney fees and commissions;</li><li>3. Payment of the bond, filing and processing fees.</li></ul>	required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
	Aff. Posting Status Rpt		Reviewed by: SEF Reviewed on: 9/12/2016
	UCCJEA	-	Updates:
	Citation FTB Notice		Recommendation: File 8- Posey

## 9 Henry Garcia Padilla (Estate)

Case No. 15CEPR00285

Attorney Flanigan, Philip M. (for Administrator Henry Michael Padilla, Jr.)

Probate Status Hearing Re: Proof of Bond

DOD: 12/7/2014	HENRY MICHAEL PADILLA, JR., was appointed	NEEDS/PROBLEMS/COMMENTS:
	Administrator with Limited IAEA Authority on	
	8/23/2016 with bond of \$10,000.00 on 8/1/2016.	OFF CALENDAR
Cont. from		Proof of <b>\$10,000.00</b> bond filed 8/23/2016.
Aff.Sub.Wit.		6/23/2016.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LEG
Status Rpt	 	<b>Reviewed on:</b> 9/12/16
UCCJEA	1	Updates:
Citation		Recommendation:
FTB Notice		File 9- Padilla

9

Thomas A. Markeson (for Petitioner Esperanza Allen, Administrator)

Petition for Settlement of First and Final Report and Account; for Allowance of Attorney Fees; for Reimbursement of Costs Advanced by Attorneys; for Reimbursement of Sums Advanced by Alfredo Cantu; and for Final Distribution

	D. 4/E/201E		ECDADANTA ALLEN, piece and Administrator	NEEDS/PROBLEMS/COMMENTS:
	DOD: 4/5/2015		ESPARANZA ALLEN, niece and Administrator	NEEDS/FROBLEMS/COMMENTS.
			appointed on 7/8/2015 with all liquid funds	Page 10B is a Petition to
			deposited into blocked account, is Petitioner.	Withdraw Funds from
			Account period: 4/5/2015 - 8/5/2016	Blocked Account.
Со	nt. from		Accounting - \$354,091.14	
	Aff.Sub.Wit.		Beginning POH - \$251,523.00	Note Re Related Case:
1	Verified		Ending POH - <b>\$277,008.08</b>	Status Hearing is set for the
<b>✓</b>	Verilled		(all cash in a blocked account)	filing of the first and/or final
	Inventory			account of the Estate of
	PTC		Administrator - <b>waives</b>	Maria S. Navarrette (estate
1	Not.Cred.			of the Decedent's mother,
Ľ			Attorney - <b>[\$9,081.82]</b>	DOD 9/29/2015, the distributee of the instant
<b>√</b>	Notice of		(less than \$11,081.82 statutory; see note)	
	Hrg			estate) on <u><b>2/1/2017</b></u> .
1	Aff.Mail	W/	Attorney X/O - \$911.25	
	Aff.Pub.		(per itemization at Exhibit C; for 4.05 hours @	~Please see additional
-			\$225/hr; for self of residence;)	page~
	Sp.Ntc.		Costs to Alfredo Cantus \$1 500.00	page
	Pers.Serv.		Costs to Alfredo Cantu- \$1,500.00	
	Conf.		(costs advanced payment to attorney)	
	Screen		Costs to Attorney - <b>\$162.50 or \$102.50?</b>	
	Letters 0626	15	(per itemization at Exhibit B; balance remaining	
	Duties/Supp		due after partial payment by ALFREDO CANTU of	
	Objections		\$1,500.00; for filing fees, probate referee,	
	Video		publication, certified copies;)	
	Receipt			
	CI Report		Accountant fees - \$600.00	
F	9202		(for accounting services; payable to Toni M.	
✓	7202		Porter, CPA;)	
1	Order			
	Aff. Posting		Closing - <b>\$1,500.00</b>	Reviewed by: LEG
	Status Rpt		(for tax reserve)	Reviewed by: LEG  Reviewed on: 9/12/16
	UCCJEA			
			Distribution pursuant to intestate succession is to:	Updates:
	Citation		PODEDANIZA ALIENI A.I. ST.I. I SU SU SU SU SU SU SU SU SU	Recommendation:
✓	FTB Notice		<b>ESPERANZA ALLEN</b> as Administrator of the <i>Estate</i>	File 10A- Cantu
			of Maria S. Navarrette, Case <u>15CEPR01170</u> –	
			May need revised distribution	

#### 10A Additional Page, Anthony Dominic Cantu (Estate) Case No. 15CEPR00506

#### NEEDS/PROBLEMS/COMMENTS, continued:

- 1. Statutory fee calculation is incorrect, as it has been based upon a miscalculated fee base of \$304,091.14, whereas the correct fee base is \$404,091.14, resulting in a correct statutory fee of \$11,081.82, rather than \$9,081.82. Need amended petition with notice of the amended petition and the changed statutory fee to which the attorney is entitled. Alternatively, attorney may accept a reduced fee of \$9,081.82 and waive the remaining \$2,000.00 in statutory fees, such that the notice as has been given for this hearing is sufficient, and the petition need not be amended.
- 2. Exhibit B, Costs Advanced lists \$60.00 filing fee for blocked account. The Ex Parte Petition for Withdrawal of Funds from Blocked Account filed 8/8/2016 is an unnecessary petition because the First and Final Report, etc. filed 8/8/2016 serves as both the petition for settlement of account and for withdrawal of funds. Court may require the \$60.00 fee be deducted from the costs paid to the attorney. (Typically, two orders are submitted for the single accounting petition: (1) Order settling account; and (2) Order to withdraw funds from blocked account.)

Thomas A. Markeson (for Petitioner Esperanza Allen, Administrator)

#### Petition for Withdrawal of Funds from Blocked Account

DOD: 4/5/2015  Cont. from Aff.Sub.Wit.  ✓ Verified Inventory PTC Not.Cred. Notice of X Hrg Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report
Cont. from  Aff.Sub.Wit.  ✓ Verified  Inventory  PTC  Not.Cred.  Notice of X Hrg  Aff.Mail X  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt
Aff.Sub.Wit.  ✓ Verified  Inventory  PTC  Not.Cred.  Notice of X Hrg  Aff.Mail X  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt
Aff.Sub.Wit.  ✓ Verified  Inventory  PTC  Not.Cred.  Notice of X Hrg  Aff.Mail X  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt
Aff.Sub.Wit.  ✓ Verified  Inventory  PTC  Not.Cred.  Notice of X Hrg  Aff.Mail X  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt
✓ Verified  Inventory  PTC  Not.Cred.  Notice of X Hrg  Aff.Mail X  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt
Inventory PTC Not.Cred. Notice of X Hrg Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt
PTC Not.Cred.  Notice of X Hrg  Aff.Mail X  Aff.Pub. Sp.Ntc. Pers.Serv.  Conf. Screen Letters Duties/Supp Objections Video Receipt
Not.Cred.  Notice of X Hrg  Aff.Mail X  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt
Notice of Hrg  Aff.Mail X  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt
Hrg Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt
Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt
Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt
Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt
Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt
Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt
Screen  Letters  Duties/Supp  Objections  Video Receipt
Letters Duties/Supp Objections Video Receipt
Duties/Supp Objections Video Receipt
Objections Video Receipt
Video Receipt
Receipt
CI Report
9202
✓ Order
Aff. Posting
Status Rpt
UCCJEA
Citation
FTB Notice

**ESPARANZA ALLEN**, niece and Administrator appointed on 7/8/2015 with all liquid funds deposited into blocked account, is Petitioner.

#### Petitioner requests:

- Withdrawal of all estate funds from the blocked account with balance of \$277,008.08 for the purpose of distribution of the estate;
- [Please refer to Page 10A];
- Petitioner also requests payment of the following creditor's claims:
  - Creditor's Claim \$5,906.47 (Claim filed 10/15/2015; payable to Andrea Goesch for funeral expenses;)
  - Creditor's Claim \$48,000.00 (Claim filed 10/15/2015; payable to Andrea Goesch for repayment of loan made by Decedent to her to care for their mother, Maria Navarrette; copies of two \$24,000.00 checks to Decedent attached.)

#### NEEDS/PROBLEMS/COMMENTS:

1. Need amended proposed order, pursuant to the issues raised related to the Petition for Settlement of First and Final Report and Account; for Allowance of Attorney Fees; for Reimbursement of Costs Advanced by Attorneys; for Reimbursement of Sums Advanced by Alfredo Cantu: and for Final Distribution. (Alternatively, if attorney waives **\$2,000.00** portion of statutory fee, proposed order is satisfactory as it stands.)

Reviewed by: LEG

Reviewed on: 9/12/16

Updates:

Recommendation:

File 10B- Cantu

10B

## 11 Christopher Bryant (GUARD/P)

Petitioner: Terrance Bryant (pro per)

Guardian: Daynna Lynnette Wood (pro per)

## **Petition for Termination of Guardianship**

	TERRANCE BRYANT, father, is petitioner.	NEEDS/PROBLEMS/
	'	COMMENTS:
Cont. from 050916, 062016, 080116 Aff.Sub.Wit.  ✓ Verified	DAYNNA WOOD, non-relative, was appointed guardian on 1/26/16. – present in court on 6/20/16.  See petition for details.	Continued from 8/1/16. Minute order states Petitioner requests continuance to cure the notice defects; not able to address them due to death in family. As of 9/8/16 the following issues remain:
Inventory		1 Nondarant at anning of the
PTC		Need proof of service of the     Notice of Hearing on:
Not.Cred.		a. Sabrina Frith (mother)
✓ Notice of		b. Terrance Bryant **
Hrg		(paternal grandfather) c. Shantel Standifer **
Aff.Mail X Aff.Pub.		(paternal grandmother)
Sp.Ntc.		d. Tracy Jones (maternal
Pers.Serv.		grandmother)**
Conf.		** Proof of service of Notice of Hearing filed 9/12/2016
Screen		shows personal service on
Letters		Terrance Bryant and Shantel
Duties/Supp		Standifer on 9/9/2016, which
Objections		is less than 15 days notice. In addition, item 6 of proof of
Video		personal service indicates
Receipt		service was by Terrance
✓ CI Report		Bryant (father) who is the petitioner. Service must be
9202		by someone over 18 and not
<b>√</b> Order		a party to the cause. Also, there is a proof of mailed service on Tracy Jones, but the proof is incomplete.
		See additional page.
Aff. Posting		Reviewed by: KT / sef
Status Rpt		Reviewed on: 9/8/16
UCCJEA		<b>Updates:</b> 9/12/2016
Citation		Recommendation:
FTB Notice		File 11- Bryant

Case No. 15CEPR00617

## 11 Christopher Bryant (GUARD/P)

Case No. 15CEPR00617

#### NEEDS/PROBLEMS/COMMENTS, continued:

**Note:** Order Appointing Guardian orders supervised visits only to the parents every Sunday from 11 am to 2 pm at the McDonalds at Jensen and 99.

Haught, Rex A. (for Administrator Dolores Kennedy)

## Petition for Final Distribution on Waiver of Accounting and Allowing Statutory Attorney's Fees

DOD: 10/2/15			DOLORES KENNEDY, Mother and	NEEDS/PROBLEMS/COMMENTS:
	D. 10/2/13		Administrator with Full IAEA without	NEEDS/TROBLEMS/COMMENTS.
<b> </b>			bond, is Petitioner.	
			Solia, is to amorion.	
			Petitioner is the sole heir and waives	
			accounting.	
	Aff.Sub.Wit.			
~	Verified		I&A: \$175,000.00	
~	Inventory		POH: \$175,000.00 (real property in	
~	PTC		Squaw Valley, CA)	
~	Not.Cred.		Administrator (Statutory): Waives	
~	Notice of		Administrator (statolory). Walves	
	Hrg		Attorney (Statutory): \$6,250.00	
~	Aff.Mail	W	,,,,,,	
	Aff.Pub.		Distribution pursuant to intestate	
	Sp.Ntc.		succession is to:	
	Pers.Serv.		Dolores Kennedy: Entire estate	
	Conf.		,	
	Screen			
>	Letters 2/5/	16		
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
~	9202			
<b>&gt;</b>	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			<b>Reviewed on:</b> 9/13/16
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
~	FTB Notice			File 12- Kennedy

#### Attorney Shawn P. Patterson, of Banning (for Petitioner Jon M. Gray)

First and Final Account and Report Petition for Allowance of Statutory Attorney Fees, Waiver of commissions, and Petition for Final Distribution

DOD: 11/28/2015			JON M. GRAY, son and Administrator, is		NEEDS/PROBLEMS/COMMENTS:	
		Petitioner.				
			1		Note: Pursuant to Local Rule	
			Account period: 11/28/2015 – 8/2/2016		7.12.6, Court will set a Status Hearing as follows:	
Со	nt. from		Accounting	_	\$282,175.13	Hearing as follows:
	Aff.Sub.Wit.		Beginning POH	_	\$281,186.58	<ul> <li>Monday, March 20, 2017 at</li> </ul>
1	Verified		Ending POH	-	\$265,033.92	<b>9:00 a.m. in Dept. 303</b> for an
					(all cash)	Informal Accounting of the
✓	Inventory				_	<b>\$82,299.90</b> Tax Reserve,
1	PTC		Administrator	-	waives	including <b>\$20.00</b> Closing
	Not.Cred.		Attorney		\$8,607.50	Reserve.
<b>✓</b>	Noi.Cred.		(statutory)	_	<b>30,007.30</b>	
1	Notice of		(3/4/0/0/)			Pursuant Local Rule 7.5, if the
	Hrg		Tax Liabilities Rese	rve-	\$82,299.90	document noted above is filed
✓	Aff.Mail	W/				10 days prior to the date listed, the hearing will be taken off
	Aff.Pub.		Closing	-	\$20.00	calendar and no appearance
1	Sp.Ntc.		Petitioner states:  †	t is antici	pated that there	will be required. <b>Filing of the</b>
	Pers.Serv.			will be a large tax situation for the tax year		informal accounting of closing reserve will not generate a new
	Conf.		2016, as the bulk o			hearing date.
	Screen		a 401K, which had			licaling date.
	<b>Letters</b> 020816		accountant for th			
	Duties/Supp			-	<b>3.01</b> funds from the rom distribution for	
	Objections		tax liabilities. To su			
	Video		and tax preparation fees, <b>30%</b> of the 401K			
	Receipt		funds in the sum of <b>\$82,299.90</b> is requested			
	CI Report		to be withheld fro			
1	9202		liabilities and for to tax year 2016.	ax prepo	aration fees for the	
1	✓ Order		197 your 2010.			
$\vdash$	Aff. Posting		Distribution pursuant to intestate succession		Reviewed by: LEG	
H	Status Rpt			Reviewed by: LLG		
$\vdash$	UCCJEA		JON M. GRAY – \$8	27 NE2 24	cash:	Updates:
$\vdash$	Citation		JON WI. GRAT - 30	or,uss.20	Cusii,	Recommendation: SUBMITTED
1	ETD AL II		ERIKA GIBSON – \$8	87,053.2	6 cash.	File 13 - Gray
7   Hartonee						

## 15 Mary Yewdall (CONS/PE)

Case No. 16CEPR00601

Attorney: Heather H. Kruthers (for Conservator Public Guardian)

## Probate Status Hearing Re Consideration of Medical Consent Powers

	PUBLIC GUARDIAN was appointed	NEEDS/PROBLEMS/COMMENTS:
	conservator of the person and estate	
	on 7/18/16.	1 Nood oursent witten status report
	Letters issued on 7/25/16.	Need current written status report pursuant to Local Rule 7.5 which
Cont. from 081516	The initial petition requested medical	states in all matters set for status
Aff.Sub.Wit.	consent powers however at the time of	hearing verified status reports
Verified	the hearing a capacity declaration had	must be filed no later than 10
Inventory	not been filed. On 7/18/16 the court	days before the hearing. Status
PTC	granted the conservatorship without	Reports must comply with the applicable code requirements.
Not.Cred.	medical consent powers and set this status hearing re: reconsideration of	Notice of the status hearing,
Notice of	medical consent powers.	together with a copy of the Status
Hrg		Report shall be served on all
Aff.Mail		necessary parties.
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen	=	
Letters	_	
Duties/Supp	_	
Objections	_	
Video		
Receipt	╡	
CI Report	=	
9202	-	
Order	-	Paviawad by: VT
Aff. Posting Status Rpt	-	Reviewed by: KT Reviewed on: 9/8/16
UCCJEA	┪	Updates:
Citation	┥	Recommendation:
	1	
FTB Notice		File 15- Yewdall

## 16 Robert Yewdall (CONS/PE)

Case No. 16CEPR00602

Attorney: Heather H. Kruthers (for Conservator Public Guardian)

## Probate Status Hearing Re Consideration of Medical Consent Powers

	PUBLIC GUARDIAN was appointed	NEEDS/PROBLEMS/COMMENTS:
	conservator of the person and estate on 7/18/16.	, ,
	Letters issued on 7/25/16.	Need current written status report pursuant to Local Rule 7.5 which
Cont. from 081516	The initial petition requested medical	states in all matters set for status
Aff.Sub.Wit.	consent powers however at the time of	hearing verified status reports
Verified	the hearing a capacity declaration had	must be filed no later than 10
Inventory	not been filed. On 7/18/16 the court	days before the hearing. Status Reports must comply with the
PTC	granted the conservatorship without	applicable code requirements.
Not.Cred.	medical consent powers and set this	Notice of the status hearing,
Notice of	status hearing re: reconsideration of	together with a copy of the Status
Hrg	medical consent powers.	Report shall be served on all
Aff.Mail		necessary parties.
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 9/8/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 16- Yewdall

16

Case No. 16CEPR00757

Petitioner: Alicia Acuna (Pro per – Paternal grandmother)

## Petition for Appointment of Guardian of the Person

			TEMPORARY DENIED 8/2/2016	NEEDS/PROBLEMS/COMMENTS:
			ILMI ORAKI DENIED 0/2/2010	14LLD3/1 ROBLEMS/COMMINICIAIS.
Co	ont. from Aff.Sub.Wit.		<b>ALICIA ACUNA</b> , paternal grandmother, is petitioner.	Minute order dated 8/2/2016 re: temporary, states the Court orders that Jesus Acuna Jr. (father) is not allowed to reside in or visit the home of Alicia Acuna [petitioner].
1	Verified		0	1. Nov. 184 (for office)
	Inventory		See petition for details.	1. Need Notice of Hearing.
	PTC			Need proof of personal service at least 15 days before the hearing
	Not.Cred.			of the Notice of Hearing with a
	Notice of	Х		copy of the general petition <u>or</u>
	Hrg			consent and waiver of notice <u>or</u>
	Aff.Mail	Х		declaration of due diligence for:
	Aff.Pub.			a. Amy Siyavong (mother) – unless the Court excuses
	Sp.Ntc.			notice
	Pers.Serv.	Х		3. Need proof of service at least 15
<b>✓</b>	Conf. Screen			days before the hearing of the Notice of Hearing with a copy of
✓	Letters			the general petition <u>or</u> consents and waivers of notice <i>or</i>
✓	Duties/Supp			declarations of due diligence for:
	Objections Video			a. Maternal grandfather (unknown)
	Receipt			b. Maternal grandmother
	CI Report	Х		(unknown)
	9202			c. Adam (sibling – last name and
<b>1</b>	Order			age not provided) – if 12 years or older
	Aff. Posting			Reviewed by: SEF
	Status Rpt			<b>Reviewed on:</b> 9/12/2016
1	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 18- Acuna
				10

## Terrance R. Goulet aka Terry Goulet (Estate) Case No. 16CEPR00821 Bergin, Robert E. (for Petitioner

Petition for Probate of Will and for Letters of Administration with will annexed; Authorization to Administer under the IAEA

DC	D: 7/24/16		KELLY GOULET, Daughter of		EEDS/PROBLEMS/COMMENTS:
			Nominee of all named exe Petitioner and requests ap as Administrator with Will A with Full IAEA without bond	pointment 1.	Need waiver of bond on mandatory Judicial Council Form DE-142 from Jeffrey Goulet or bond of \$156,000.00.
>	Aff.Sub.Wit.  Verified  Inventory	S/P	All heirs waive bond (see # Will dated 11/13/86	No.	ote: If granted, the Court will set atus hearings as follows:
	PTC Not.Cred.		Residence: Fresno Publication: Business Journ	• al	Monday, October 31, 2016 for filing of bond, if required
<b>*</b>	Notice of Hrg Aff.Mail	W	Estimated value of estate: Personal property: \$125,0	00.00	Monday, February 13, 2017 for filing Inventory and Appraisal
	Aff.Pub. Sp.Ntc. Pers.Serv.		Real property: \$31,00 Total: \$156,0	•	Monday, November 13, 2017 for filing the first/final account.
	Conf. Screen		Probate Referee: Rick Smi	in	
<b>&gt;</b>	Letters Duties/Supp Objections				
	Video Receipt CI Report				
	9202				
~	Order				
	Aff. Posting Status Rpt				eviewed by: skc
	UCCJEA				pdates:
	Citation			Re	ecommendation:
	FTB Notice			Fil	le 19- Goulet

Boyett, Deborah K. (for Petitioner Donald A. DeBernardi)

Petition for Probate of [LOST] Will and for Letters Testamentary; Authorization to Administer Under the IAEA

<b>DOD:</b> 4/28/16			DONALD A. DEBERNARDI, Named Executor	NEEDS/PROBLEMS/COMMENTS:
			without bond, is Petitioner.	Note: This petition requests
			Full IAEA – ok	that the decedent's lost will
			[I OCT] \ACH = 1 = 1 0 /0 4 / 1 5	dated 3/24/15 be admitted to
	Aff.Sub.Wit.	S/P	[LOST] Will dated 3/24/15	probate. A copy is provided, and Attorney Horton's
>	Verified	0/1	Residence: Clovis	declaration addresses the
	Inventory		Publication: Business Journal	presumption under §6124 that
	PTC		Estimate division of estate.	a lost will may be revoked.
	Not.Cred.		Estimated value of estate: Personal property: \$ 5,000.00	The proposed order contains a copy of the will per §8223.
>	Notice of		Real property: \$150,000.00	(
	Hrg		Total: \$155,000.00	1. Petition is blank at #5a(7)
>	Aff.Mail	W	Probate Referee: Rick Smith	and (8) re issue of
>	Aff.Pub.		Flobate Referee. Rick Striitt	predeceased child.
	Sp.Ntc.		Declaration of Lisa Horton filed 9/12/16	
	Pers.Serv.		states while an associate attorney with the	Note: If granted, the Court will
	Conf. Screen		law firm of Walters & Moshrefi, Attorneys at Law, PC, she consulted with the decedent	set status hearings as follows:
>	Letters		re preparation of his last will and testament.	<ul> <li>Monday, February 13, 2017</li> </ul>
>	Duties/Supp		The decedent was represented by Attorney	for filing Inventory and
	Objections		Mary Moshrefi in dissolution proceedings.	Appraisal
	Video		After he executed the will, the original was given to the decedent. As expressed to	Monday, November 13,
	Receipt		Attorney Horton, the decedent's desire in	2017 for filing the first/final
	CI Report		executing the will was to ensure that his wife	account.
	9202		not receive any distribution from his estate	
>	Order		following his death. He was adamant about this. On 1/12/16, Attorney Horton met with	
	Aff. Posting	<u> </u>	the decedent at Willow Creek Healthcare	Reviewed by: skc
	Status Rpt UCCJEA		and he reaffirmed this desire, and executed	Reviewed on: 9/13/16 Updates:
	Citation		an Interspousal Transfer Grant Deed	Recommendation:
	FTB Notice		breaking the joint tenancy on his residence to ensure that his share would go to his	File 20- Garcia
			daughters as stated in his will. Although the	
			dissolution proccedings were initiated in	
			2011, no resolution or judgment was	
			reached prior to his death.	

#### Malinda Thomas aka Malinda Ulsh (Det. Succ) Case No. 16CEPR00824 21 Kaster, Lee L. (of Walnut Creek, CA, for Petitioners) Attorney

Petition to Determine Succession to Real Property

	D: 10/22/15	DAVID M. THOMAS, JORDAN THOMAS,	NEEDS/PROBLEMS/COMMENTS:
	D. 10/22/13	and DYLAN THOMAS, Surviving Spouse,	NLLD3/FROBLEMS/COMMENTS.
<b> </b>		Daughter, and Son, are Petitioners.	Note: The decedent was not a
			resident of California, but died
		40 days since DOD	owning property in this county.
	Aff.Sub.Wit.	No other proceedings	
~	Verified	10 A : \$75 000 00 /u= =1 := u= = = = = = = = = = = = = = = = = =	
>	Inventory	1&A: \$75,000.00 (real property located at 117 Elm Avenue in Clovis)	
	PTC	di 117 Liiti Avende iii Clovisj	
	Not.Cred.	Decedent died intestate	
~	Notice of		
	Hrg	Petitioners request Court determination	
~	Aff.Mail	that the decedent's 100% separate	
	Aff.Pub.	property interest in the real property in	
	Sp.Ntc.	Clovis passes to them in equal 1/3 shares pursuant to intestate succession.	
	Pers.Serv.	shares poisoant to intestate soccession.	
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
>	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 9/13/16
	UCCJEA	_	Updates:
	Citation	_	Recommendation: SUBMITTED
	FTB Notice		File 21- Thomas